

User Guide

TWS Rules V2.1

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Contact and Support

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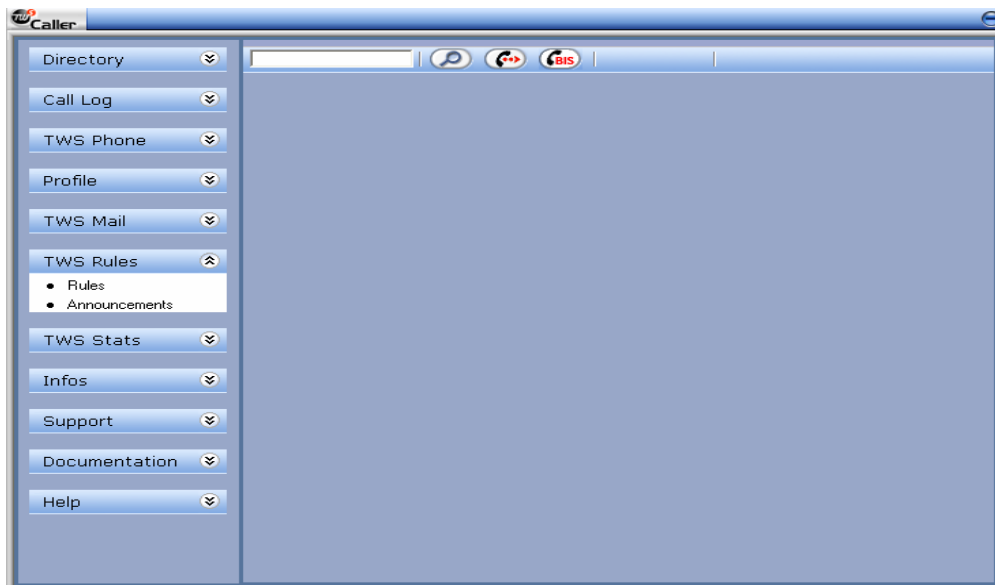
User Guide

Table of Contents

1. OVERVIEW.....	4
2. USING TWS RULES.....	6
2.1. Creating a call-forwarding rule (4 step).....	7
Step 1: General.....	8
Step two: Forward	9
Step three: Calendar.....	10
Step four: Filtering – Managing lists	11
2.1.1.1. Shared contact list manager	13
2.1.1.2. Specific contact list manager	15
2.1.1.3. Example of how lists are used	16
2.2. Displaying and managing rules	16
2.2. Displaying and managing rules	16
Rule priority: example of use	18
Testing the behaviour of your call forwarding rules.....	19
2.3. Recording announcements.....	20

1. Overview

Like all TWS applications, TWS Rules is a thin-client solution that does not need to be installed on your PC. Its user interface is based on HTML pages integrated into TWS Caller menus.



TWS Rules is an integrated application in the TWS Caller window which allows incoming calls to be managed intelligently using forwarding and filtering rules.

These rules are very easy to create; a wizard guides the user through the different rules-creation steps.

The user himself or herself defines the criteria for routing and filtering incoming calls by fixing the following parameters:

- Forward destination
- Activation period
- The numbers to exclude or include
- The voice announcement to play back before forwarding or transferring the incoming call

TWS Rules is, therefore, an-easy-to-use and efficient application which enables you to effectively manage your incoming calls.

This document presents TWS Rules and describes in detail how to make the most of it.

NOTE : do not use the PBX and TWS phone forwarding functions to avoid a conflict of rules between the PBX, TWS Phone and/or TWS Rules. Any reciprocal rule detected will not be executed. For example, one of your rules provides for forwarding to a correspondent who equally has a rule for forwarding to you.

2. Using TWS Rules

By default, the *TWS Rules* window is located in the *TWS Caller* menu; to access it:

Click  (on the *TWS Caller* bar) then on:



You then have access to the *TWS Rules* menu comprising *Rules* and *Announcements*.

2.1. Creating a call-forwarding rule (4 step)

To create a call-forwarding rule, click *Rules* in the *TWS Rules* menu: the main management page of your intelligent forwarding rules opens.

On your forwarding-rule management page, click *Create* to start the rules creation wizard.

EXAMPLE: the images displayed give a good example of a call-forwarding rule for an employee who attends a meeting on Mondays and Fridays and who wishes to be disturbed only by members of the management. In the example, this employee will be called Mr Hector.

Step one: General

This page lets you give a title to your rule.

New rule creation

General

Edition of the rule

General Forward Calendar Filter

Cancel Next

The 4 different steps.

It is possible to cancel the operation at any moment.

Next step.

If forwarding rules have already been defined, this page contains an additional field, which enables you to define a priority level for your new rule, compared to the already existing rules (see image below).

Step two: Forward

The second page allows you to define the inbound call forwarding parameters: to which number will the calls be forwarded? With what type of forwarding (immediate, on no answer, on busy)? Will an announcement message be broadcast to your correspondent before calls are forwarded?

New rule creation

Forward

Forward number: ☒ Forward to the message box

Edition of the rule:

Customized vocal message:
Absent (Clientele)
Absent (Reunion)
Msg_Before_MsgBox
Msg_to_Franck
No message

General Forward Calendar Filter

Cancel Previous Next

If the box is ticked, your correspondent will be forwarded to your voice mail. Otherwise, enter the number to which your correspondent will be forwarded.

Will your correspondents be forwarded immediately, on no answer or when the line is busy?

The messages displayed here are those you have recorded from the *Messages* menu (cf. 2.3). If you choose *No message*, you cannot broadcast any message.

INFORMATION: if for a rule the *Delay before forwarding* is *Immediate*, it is normal for you to hear a first ring tone on your telephone set before your correspondent is forwarded to the number you have indicated.

INFORMATION: if thanks to *TWS Rules* you forward your incoming calls to your voice mail - *TWS Mail* or any other voice mail system - and you choose to broadcast a message before forwarding is executed, your correspondent will hear two messages successively: one from *TWS Rules* and the other from your voice mail system.

Step three: Calendar

It is possible in this third step to specify the period during which the rule you define will be applied.

New rule creation

Calendar

Start Date: 1/2/2006

End date: 1/16/2006

☒ No date limit

Start hour: 08 h 00

End hour: 13 h 00

Valid days: ☒ mon ☐ tue ☐ wed ☐ thu ☒ fri ☐ sat ☐ sun

General Forward **Calendar** Filter

Cancel Previous Next

If you tick *No date limit*, the rule will be applied indefinitely as from the start date. Otherwise, choose an end date.

Choose the time during which the rule will be applied.

Choose the days of the week on which the rule will be applied.

Step four: Filtering - Managing lists

This last step enables you to choose the numbers to be filtered and to which the rule may or may not be applied.

New rule creation

Filter

Blue number

Type	List name / contact
------	---------------------

Red number

Type	List name / contact
------	---------------------

General Forward Calendar Filter

Cancel Previous Finish

The rule will apply to correspondents on this list.

The rule will not apply to correspondents on this list.

Pop-ups on the numbers to which the rule will or will not apply. Click on them.

Create contact lists from the directories to which the rule will or will not apply.

Create specific contacts who do not necessarily exist in the directories and to whom the rule will or will not apply.

INFORMATION: when the number of one of your correspondents is both in *Blue numbers* and *Red numbers* (available on a list or as a specific contact) the rule will not apply to this number, and this correspondent will not be forwarded because *Red numbers* are first considered before *Blue numbers*.

To create a list from the contacts listed in your directories (this list will be used by the rule in *Red numbers* or *Blue numbers*, click or ; the next page will open.



The **Blue numbers** represent the list of contacts to which the rule applies:

These contacts will be systematically subjected to the existing rule. It is possible to use contact lists from directories, or to create specific contacts for the rule. The lists can be reused in all the rules.

On the other hand, creating a specific contact manually enables you to create a contact that is visible only in the existing rule. It also allows the use of patterns such as 06* (to include all French mobile phone numbers).

If no contact has been defined in *Blue numbers*, the rule applies to everyone, except those in *Red numbers*. If at least one contact is present, all the other numbers are excluded. In this case, there is no point in using filtering by *Red numbers*.

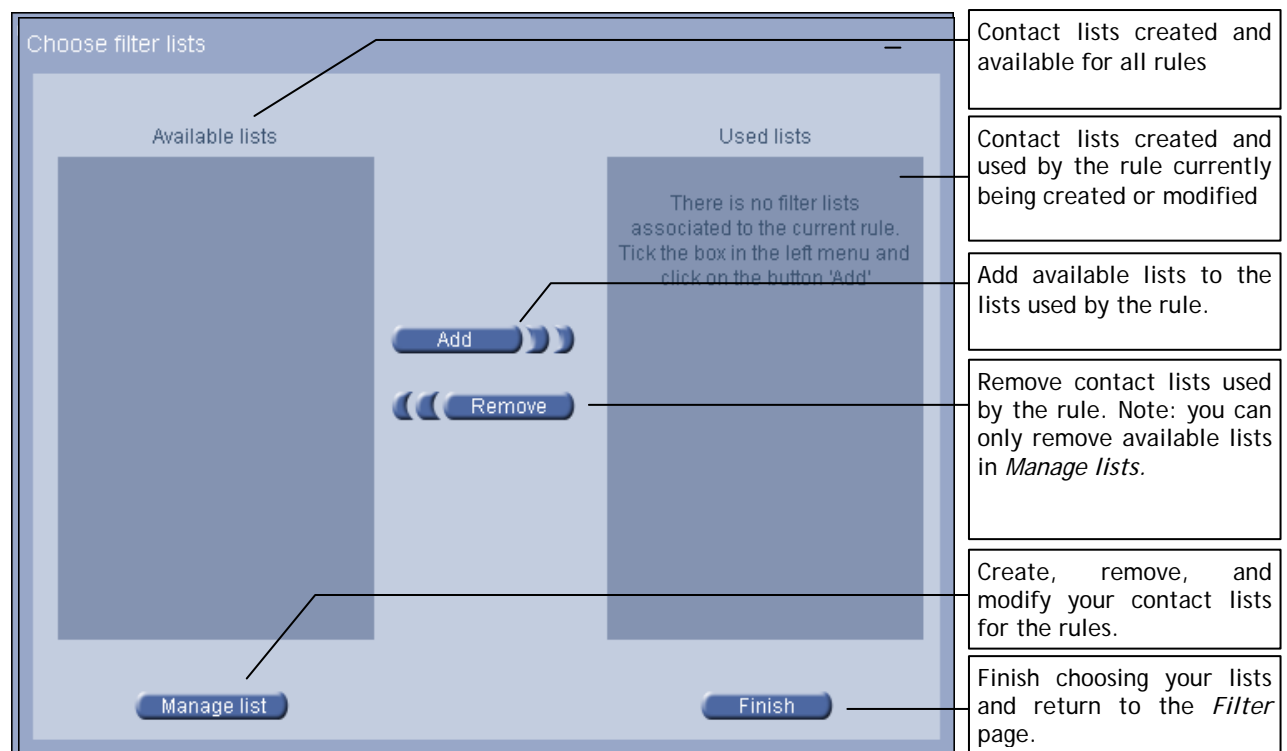
Red numbers represent the list of contacts to whom the rule does not apply:

These contacts will be systematically ignored by the existing rule. It is possible to use existing  lists, or to create specific contacts for the  rule.

If no contact has been defined in *Red numbers*, the rule applies to everyone, except those in *Blue numbers*.

Different cases of rules:

- A rule that does not contain any *Blue number* or *Red number* applies to all calls.
- A rule containing only *Blue numbers* but no *Red numbers* applies only to calls whose number is in the list of *Blue numbers*.
- A rule containing *Blue numbers* and *Red numbers* applies only to calls from *Blue numbers* and not *Red numbers*.
- A rule containing no *Blue number* but *Red numbers* applies to all calls except calls that are part of the list of *Red numbers*.



The screenshot shows a 'Choose filter lists' dialog box with two main panels: 'Available lists' on the left and 'Used lists' on the right. Between the panels are 'Add' and 'Remove' buttons. At the bottom are 'Manage list' and 'Finish' buttons. Annotations on the right side explain the components:

- Available lists:** Contact lists created and available for all rules.
- Used lists:** Contact lists created and used by the rule currently being created or modified.
- Add button:** Add available lists to the lists used by the rule.
- Remove button:** Remove contact lists used by the rule. Note: you can only remove available lists in *Manage lists*.
- Manage list button:** Create, remove, and modify your contact lists for the rules.
- Finish button:** Finish choosing your lists and return to the *Filter* page.

Then click  to go to the list manager.

2.1.1.1. Shared contact list manager

Editing/creating lists. To create a list, choose *Create a new list*.

Enter the name of your list.

List of directories authorised for TWS Rules.

Type the first letter of the name or contact name you are looking for. Display all contacts in the selected directory. Empty this area.

Delete the list selected on top.

Save a new list or modifications made to a selected list.

Return to *Choose filter lists*.

The above screenshot shows how to *Create a new list*.

Manage list

List edition/List creation

Create a new list [dropdown] List name: Direction

Add a contact

Algoria [dropdown] [empty search field] [Search]

Contacts in the list :

Del.	First name	Name	Device
<input checked="" type="checkbox"/>	Jocelyn	AZIERE	4031
<input checked="" type="checkbox"/>	Jocelyn	AZIERE	06 45 00 00 00
<input checked="" type="checkbox"/>	Jocelyn	AZIERE	01 45 00 00 00
<input checked="" type="checkbox"/>	Marc	CHARTIER	4032

Buttons: Delete this list, Save changes, Back to the rule

Annotations:

- Selected directory: **ALGORIA**
- Empty search field for all **ALGORIA** contacts
- Add all numbers of this contact.
- Add all numbers of all contacts.
- 4032 – Click here to filter this number
- Remove this contact's number from the list.
- Remove all numbers from the list.
- Click *Save changes* after choosing the numbers, to back up your list.

After creating the lists and returning to rule, the following window opens, for instance:

Available lists

- ☒ Algoria
- ☒ Direction



Used lists

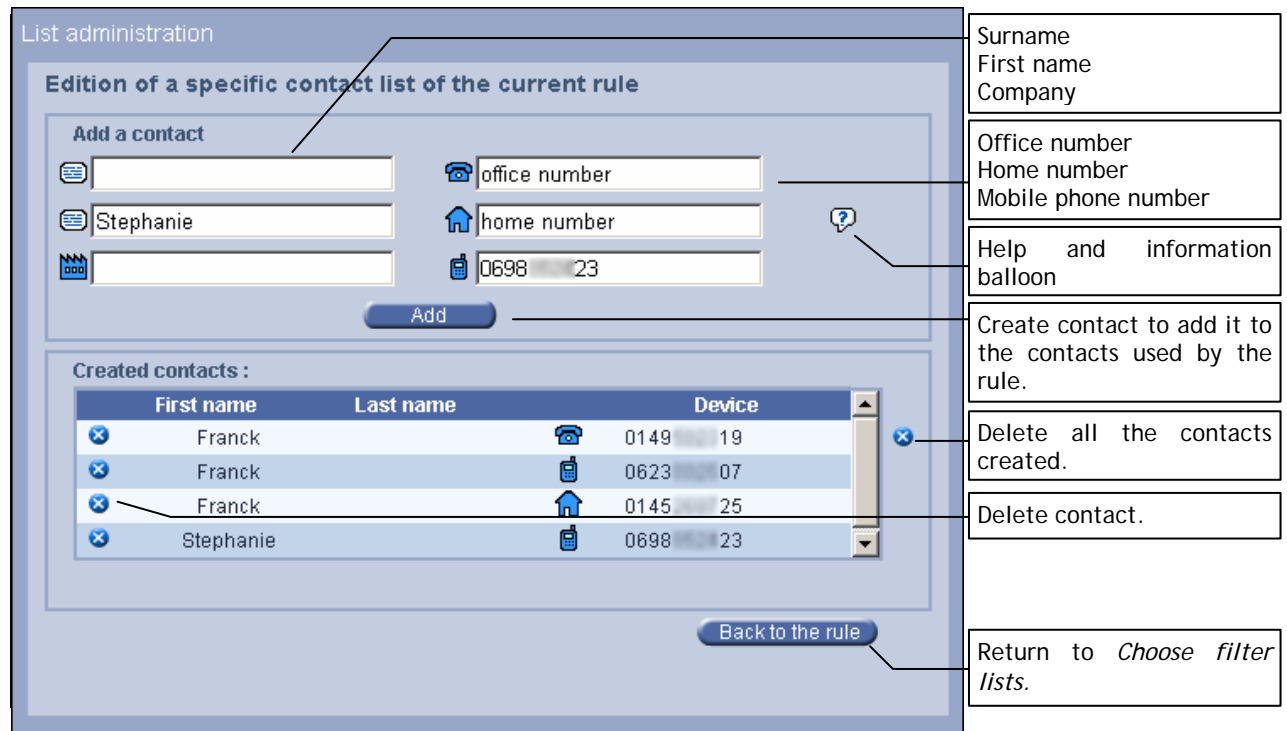
There is no filter lists associated to the current rule. Tick the box in the left menu and click on the button 'Add'

Buttons: Add, [toggle switch]

You can then add these lists for the rule you are creating or modifying, or for any other rule you have created, then return to the *Filter* page.

2.1.1.2. Specific contact list manager

To create specific contacts for a rule and which will be used by the rule as *Blue numbers* or *Red numbers*, click respectively on  or : the following page opens.



The screenshot shows a web interface for managing contact lists. The main title is 'List administration'. Below it, the section is 'Edition of a specific contact list of the current rule'. There are two main parts: 'Add a contact' and 'Created contacts'.

Add a contact: This section has three input fields for 'Surname', 'First name', and 'Company'. Below these are three phone number fields: 'office number', 'home number', and 'Mobile phone number'. The 'Mobile phone number' field is pre-filled with '0698 23'. There is an 'Add' button at the bottom of this section. A help balloon icon is also present.

Created contacts: This section displays a table of contacts. The table has columns for 'First name', 'Last name', and 'Device'. There are four contacts listed: three for 'Franck' and one for 'Stephanie'. Each contact has a delete icon (a blue 'x' in a circle) to its left. A 'Back to the rule' button is at the bottom right of the table.

Annotations: Lines connect various elements to text boxes on the right:

- Surname, First name, Company
- Office number, Home number, Mobile phone number
- Help and information balloon
- Create contact to add it to the contacts used by the rule.
- Delete all the contacts created.
- Delete contact.
- Return to Choose filter lists.

Contacts created here are immediately added to the contact lists used by the rule.

You must not fill in all the number fields; at least one is enough.

Only the surname and first name of a contact are displayed.

You can use an asterisk (*) to indicate a number prefix (06* for mobile phones, for example).

2.1.1.3. Example of how lists are used

EXAMPLE: Mr Hector is creating a rule that will allow only certain members of the management team to disturb him during his meeting hours. So he is creating a list of management team members (cf. 2.2.4.1) and adding specific contacts who will be allowed to reach him (cf. 2.2.4.2). He is applying the following filter:

Filter

Blue number

Type

List name / contact

Red number

Type

List name / contact

The *Red numbers* are not subject to the forwarding rule. Mr Hector has chosen forwarding to voice mail. Therefore, the management, Franck and Stephanie will not be forwarded to his voice mail.

The *Blue numbers* are subject to the rule. Mr Hector has not added any contact there; this means that any contact not included in the list of *Red numbers* will be subject to the forwarding rule.

Mr Hector's filter is correctly applied. He will only be disturbed by those persons he has chosen.

INFORMATION:

When the *Inclusive filter* (blue number) list is empty, this means that all numbers are subject to the rule.

When the *Exclusive filter (red numbers)* list is empty, this means that no number will be exempted from the rule.

2.2. Displaying and managing rules

This is how your rules will be displayed in the menu *TWS Rules* then *Rules*.

In this *TWS Rules* main page, you will see in detail all the rules you have created. You have the possibility to delete them or to use the wizard to modify them or create new ones.

The screenshot displays the 'Rule of Hector' interface. At the top, a table lists three rules: 'Absent (Clientele)', 'Reunion', and 'News for Franck'. Each rule has a selection mark (a green circle), a title, a 'Forward to' field, and a 'Pty' (priority) field. Below the table are buttons for 'Modify', 'Remove', 'Test rules', and 'Create'. The 'Rule Details' section for the 'Reunion' rule shows fields for Title, Period, Week Days, Time Slot, Vocal customized Msg, Forwarded destination, Forward delay, and Filter. The 'Filter' section includes 'Inclusive filter' and 'Exclusive filter'.

Callouts on the right side of the image provide explanations for various UI elements:

- Selection mark:** A green circle next to the rule name.
- Message broadcast:** A speech bubble icon next to the rule name.
- Rule priority:** A number in the 'Pty' field. When a number is subject to several rules, priority determines the one to be applied.
- Modify selected rule:** The 'Modify' button.
- Delete selected rule:** The 'Remove' button.
- Test your rules:** The 'Test rules' button. Simulate calls from your contacts to see the result of rule application.
- The rule with the highest priority level is placed on top:** The rule with the highest priority level is placed on top.

It is interesting at this level to be able to test your rules. Simulate calls from your contacts to know how forwarding will take place, which rule will be applied, and which message will be broadcast. These are the operations inherent in this feature and which will be very useful while creating and using your rules.

Rule priority: example of use

EXAMPLE: Mr Hector will be away for ten days. He creates the rule *Absent (cliente)*:

Rule Details	
Title	Absent (Cliente)
Period	1/11/2006 to 1/20/2006
Week Days	All days
Time Slot	All the day
Vocal customized Msg	Absent (Cliente).wav
Forwarded destination	Vocal message box
Forward delay	Immediate
Filter	
Inclusive filter	
Exclusive filter	

Moreover, he would like:

- his colleague *Franck* to take his call when he calls (*Msg_to_Franck.wav*)
- to be transferred on no answer to his assistant (*4036*) if she is present.

Rule Details	
Title	News for Franck
Period	1/2/2006 to 1/9/2006
Week Days	Monday Tuesday Thursday Friday
Time Slot	09:00 to 20:00
Vocal customized Msg	Msg_to_Franck.wav
Forwarded destination	4036
Forward delay	No reply
Filter	
Inclusive filter	Franck
Exclusive filter	

Now, Mr Hector wishes to classify his rules according to the order of priority. He places the rule *Absent (cliente)* on top of the list. So anybody calling during the specified period (from *11/01/2006 to 20/01/2006*) will be transferred to voice mail with the message *Absent_Clientele.wav*.

Mr Hector would not like anybody to disturb him during his meeting hours. Therefore, *Meeting* is placed in the second position to filter those who may reach him. For the rule *News for Franck* to work, Mr Hector places it in the third position.

Why? The *Meeting* rule also governs *Franck's* numbers. They are part of the *Exclusive filter* list; so if *Franck* calls on Thursday 05/01/2006, for instance, the *Meeting* rule will not transfer him to voice mail, and the rule *News for Franck* will be applied.

Testing the behaviour of your call forwarding rules

On the main page of *TWS Rules* (*TWS Caller TWS Rules* menu, then *Rules*), click *Test rules*. The following screen is displayed.

The screenshot shows a web form titled "Test of the rule of Hector". It contains the following elements:

- Calling date:** A dropdown menu showing "01/02/2006". A callout box points to it with the text: "Default call date. Date of call."
- Calling hour:** Two input boxes for "10" and "34" separated by an "H". A callout box points to it with the text: "Default call hour. Time of call."
- Appellant:** A text input field. A callout box points to it with the text: "Enter your contact's number."
- Test:** A button. A callout box points to it with the text: "Press this button to start the test."
- Test result:** A large empty area. A callout box points to it with the text: "The test result is displayed here."
- Finish:** A button at the bottom. A callout box points to it with the text: "Return to the TWS Rules main page."

EXAMPLE: Mr Hector would like to check that his call forwarding rules are working correctly; so he performs this test.

The screenshot shows the same form as before, but with the following changes:

- Calling date:** Now "02/01/2006".
- Calling hour:** Now "16" and "58".
- Appellant:** Now "0623" and "07".
- Test:** The button is still present.
- Test result:** Now displays the message: "Valid rule : 'News for Franck' - Description: 0623 07 is forwarded to 4036 with the vocal message Msg_to_Franck.wav".
- Finish:** The button is still present.

He checks that his colleague *Franck* is forwarded to his assistant with message recorded only for him.

After you have tested the behaviour of your rules, they are ready to work properly and forward your incoming calls intelligently according to the parameters you have defined.

2.3. Recording announcements

When you click *Messages*, the following page opens so you can manage your announcements.

The screenshot shows the 'Announcement administration' interface. It has a top bar with a 'Callback' button and a text field containing '4044'. Below this are two main panels: 'Existing Announcements' on the left and 'New Announcement' on the right. The 'Existing Announcements' panel includes a 'Hear the selected announcement' button, a list of announcements ('Absent', 'Forward', 'Meeting', 'Message for Franck', 'MyAnnouncement'), and a 'Delete the announcement' button. The 'New Announcement' panel includes 'Start recording', 'Stop recording', 'Listen the record', and 'Save the announcement' buttons, followed by a text field containing 'MyAnnouncement'. At the bottom, there is a status bar with 'At rest' on the left and 'TWS-RUL-4044' on the right. Five callout boxes provide additional information: 1. Points to the 'Callback' button: 'Have somebody call you back from an extension. You must do this to read or record announcements.' 2. Points to the '4044' text field: 'Number of the extension from which the announcement will be recorded or listened to.' 3. Points to the list of existing announcements: 'Recorded messages which can be selected in order to be listened to or deleted.' 4. Points to the 'Save the announcement' button: 'Status of announcement administration and extension number used. An announcement has just been saved here.' 5. Points to the 'TWS-RUL-4044' status bar: 'Status of announcement administration and extension number used. An announcement has just been saved here.'

How does it work? Press *Voice server call*. A set calls you. Once the call is set up, you can start recording, then stop, listen to the recorded announcement and repeat the operation if you do not like the announcement.

To save the announcement, give it a name (*Transfer_Std_Messagerie* in the above example) and click *Save the announcement*. The name of your announcement appears on the list on the left. You can listen to the announcement again any time by clicking *Hear the selected announcement*. You can even delete it and, above all, use it in *TWS Rules*.